

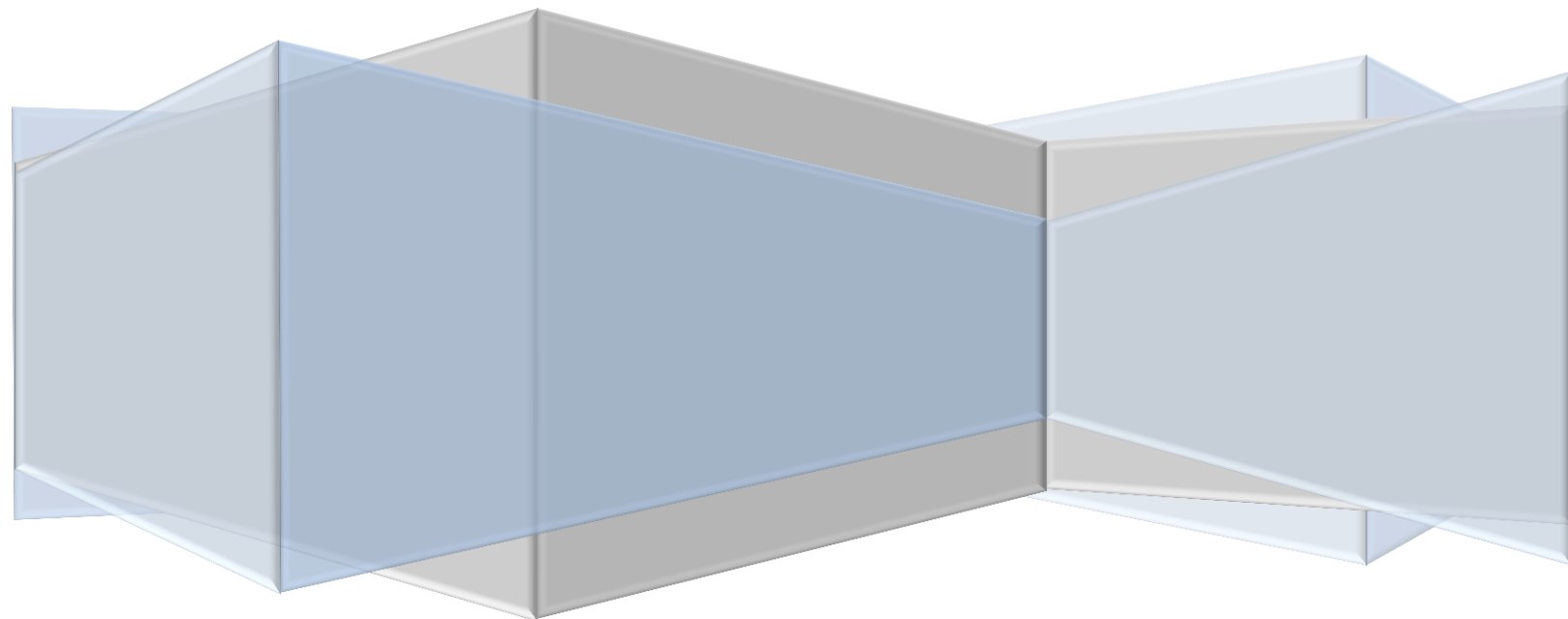
Carlisle Council On Aging (COA) Long Range Plan FY15-FY19

Approved by the COA Board: June 17, 2014

Summary: This document contains strategic direction, background information, significant trends, and internally identified Keys to Success supported by an Action Plan. A glossary aids the reader in understanding unfamiliar terms and organizations. Exhibits supporting conclusions can be found in the Appendices. While maintaining flexibility to work as circumstances dictate or opportunities arise, the COA Department and Board present this five year action plan with suggested annual focus areas to prioritize future direction:

- FY15: Transportation; Marketing, Communications, and Branding
- FY16: Nutrition; Program and Department Space Requirements
- FY17: Senior Tax Relief; Housing Options

Created by COA Long Range Planning Subcommittee: Liz Bishop, Mary Daigle, Verna Gilbert, David Klein-COA Director, Melinda Lindquist, Abha Singhal-COA Board Chair 2014, Liz Thibeault-Subcommittee Chair, Jace Tilton-Friends of the Carlisle COA



Carlisle Council On Aging

Table of Contents

Section 1: Strategic Direction 2

Section 2: Background 4

 Town of Carlisle..... 4

 Significant Trends..... 4

 Council On Aging..... 5

Section 3: Keys to Success 7

Section 4: Action Plan 7

 I. Trust: Ensuring prudent management of the COA 7

 II. Independence: Supporting mobility and access for Carlisle seniors and mobility-challenged adults..... 8

 III. Connection: Providing opportunities for positive interaction for Carlisle seniors 9

 IV. Functionality: Supporting emotional, cognitive, and physical well-being of Carlisle seniors 10

 V. Security: Aiding safety and stability for Carlisle seniors..... 11

Glossary..... 13

Appendices..... 16

 Exhibit I: Inclusive Process Generates Comprehensive Plan 17

 Exhibit II: SWOT Assessment Guides Long Range Plan Process..... 18

 Exhibit II: SWOT Assessment Guides Long Range Plan Process (cont’d.) 19

 Exhibit III: Taxes and Housing Options Affect Decision to Age in Place 20

 Exhibit IV a: Town Survey Shows Need for Varied Housing Options..... 21

 Exhibit IV b: Limited Housing Options Challenge Aging in Place 22

 Exhibit V: Residents See Need for Varied Transportation Services 23

 Exhibit VI a: Trend - Age 60+ Cohort Grows Despite Total Population Decline 24

 Exhibit VI b: Trend – The COA Must Attract Maturing Baby Boomers 25

 Exhibit VII: Funding Sources Augment COA Reach and Impact..... 26

Section 1: Strategic Direction

The Carlisle Council On Aging (COA) Department functions as a social services agency for the town. Capable management and an experienced, enthusiastic staff position the COA for operational effectiveness to maintain or improve the quality of life for Carlisle's age 60+ residents, "seniors" as defined by the Massachusetts Executive Office of Elder Affairs. This long range plan articulates a strategic vision with measurable actions to achieve the COA's *Keys to Success*:

- Trust: Ensuring prudent management of the COA
- Independence: Supporting mobility and access for Carlisle's adult citizens
- Connection: Providing opportunities for positive interactions for Carlisle seniors
- Functionality: Supporting emotional, cognitive, and physical well-being of Carlisle seniors
- Security: Aiding safety and stability for Carlisle seniors

Developed by a COA Board subcommittee, with representation by the Friends of the Carlisle Council on Aging, in conjunction with the COA Director (*Exhibit I*), the plan is a "living" document to prioritize objectives, measure progress, and achieve the COA mission. Initially, the subcommittee assessed current internal strengths/weaknesses and external opportunities/threats (SWOT), shown in *Exhibit II*. These factors guided the action plan development. Additional factors, identified by respondents of the 2009 Town Survey Question #3 (66% of respondents were age 50+) as important, are:

- Tax relief
- Housing alternatives
- Access to transportation
- Aging in place/livable community

Many of Carlisle's age 60+ residents want to remain in Carlisle. To that end, COA services and programs must continue to support accessible and safe independent living in one's home. Other components of independent living are access to information, especially on-line, and access to programs and services that support cognitive, emotional and physical well-being. Mobility is also essential, whether within one's home or transportation to support and augment basic needs, such as food shopping and medical appointments. Future considerations include expansion of transportation services for mobility-challenged adults as well as advocacy for additional senior tax relief.

A livable community is a connected place. Due to the town's rural nature, Carlisle's age 60+ residents can feel isolated and alone. Stimulation through social programs and services provide participants with an improved sense of security and community. Referrals for local, state, and federal financial support services offer eligible residents alternatives for improving financial stability through such options as the Senior Tax Worker Program, SHINE counseling, and food and fuel assistance. Potential future tax relief programs would benefit qualified, long-term residents.

A key factor in planning for the future priorities that the COA and Carlisle will face is the very large population of Baby Boomers (a segment of over 70 million nationally, born between 1946 and 1964). As of 2014, this population ranges between 50 and 68 years of age. It is anticipated that within ten years this population segment will represent 45% of the town. (Source: Town Clerk, February, 2014)

and will cause a steep increase in demand for COA services. Carlisle must prepare for this increased demand by addressing the needs of Baby Boomers, while evaluating and maintaining its programs and services to older residents.

Retention of Carlisle's age 60+ residents strengthens the town's fiscal foundation. Notably, with roughly 25% of the population born before 1955 and typically not enrolling children in public schools, these residents' taxes play a key role in funding the educational needs of the town, while not incurring additional educational costs. However, many residents find the lack of housing alternatives a limiting factor to remaining in town. Existing housing stock offers relatively few smaller/attached, easily maintained and/or affordable residences, thereby fueling a trend of Carlisle seniors needing to leave town to find these more livable residence choices. All townspeople, as well as the COA, will need to advocate for more housing alternatives to retain this necessary group of tax payers.

The COA will work in the near future, through marketing and communication efforts, to strengthen the department's identity in order to attract Baby Boomers to its programs and solicit input on additional programs to address their needs. The COA will work to integrate Baby Boomers as well as involve them and age 50-59 residents in volunteer efforts to ensure a strong COA, poised for the future. With a greater understanding of the impact of this emerging population, the COA will assess space needs and advocate for additional program and department space and staff, as required.

The challenges and opportunities for the next five years and beyond are many. While maintaining flexibility to work as circumstances dictate or opportunities arise, the Council on Aging Department and Board expect to progress on many critical fronts over the next three years. In summary, each fiscal year shall have focus areas:

- FY15: Transportation
Marketing, Communications, and Branding
- FY16: Nutrition
Program and Department Space Requirements
- FY17: Senior Tax Relief
Housing Options

To enhance understanding of unfamiliar terms, please refer to the Glossary.

Section 2: Background

Town of Carlisle

Carlisle is a small rural town about 20 miles northwest of Boston, with a gross population of 5380 (Source: Town Clerk February, 2014). Town government is comprised of elected officials and volunteers. The Board of Selectman, the Finance Committee, and a Town Administrator steer town government, budgeting, and spending, subject to Town Meeting approval. Residents of this highly educated, aging, affluent town share these values:

- learning/education
- open space
- strong community connection
- volunteering
- physical well-being

Respondents to the Town Survey of 2009 identified three priorities that affect Carlisle's quality of life:

- tax relief (*Exhibit III*)
- varied housing options (*Exhibits IV a and IV b*)
- access to a variety of transportation services (*Exhibit V*)

Significant Trends

Several trends impact the Town of Carlisle:

- The Graying of Carlisle (*Exhibit VI a*): In 2011, Carlisle's age 60+ cohort was roughly 20% of the population; in 2014, roughly 24%. This outpaces today's national trend and exceeds the national prediction for 2030. "Around 40 million people are currently over 65, some 13% of the total population, with that number also predicted to double by 2030, accounting for nearly 20% of the population." (Source: National Institute on Aging (NIA), Older Americans, 2012, available at www.agingstats.gov) Today the 50+ town population represents 45.52%. (Source: Town Clerk, February, 2014)
- Maturing of Baby Boomers with Unique Viewpoints and Needs (*Exhibit VI b*): Over 70 million Americans born between 1946 and 1964 are known as Baby Boomers. Generally, they expect to work longer and retire later than their parents did. As of February, 2014, Baby Boomers (1928 residents) are 35.8% of the total Carlisle population and have unique needs that must be addressed now and in the future. "Some 82% of workers age 50 and older say it is at least 'somewhat likely' they will work for pay in retirement; 11% plan to never retire." (Source: October 2014 Associated Press-NORC Center for Public Affairs Research at the University of Chicago)
- Emerging Need for Increased/Differentiated Transportation: The Carlisle Transportation Survey of 2013 (145 respondents) demonstrated a need for more transportation options from 40 mobility-challenged adults. Projected needs were estimated at 100 or more one-way ride requests per week. In comparison, senior one-way rides in 2013 averaged 35 per week.

Council On Aging

Why: Department Mission, Target Audience

The mission of the Council On Aging is to provide advocacy and support services to help Carlisle seniors live dignified and independent lives. The COA strives to continually improve the quality of life for Carlisle citizens, 60 years and older, by identifying their needs and matching available public and private resources to address those needs. The COA is dedicated to compassion, outreach, and advocacy.

The primary audience is Carlisle's age 60+ residents. Carlisle, following the guideline of the Massachusetts Executive Office of Elder Affairs, counts people age 60 and over as seniors. This group is outpacing the general Carlisle population growth rate and, in 2014, is 24.5 % of the population or roughly 1300. (Source: Town Clerk, February, 2014) The audience can be further broken into adjusted population decade segments:

- 50-59 years of age (21.12%) (emerging Baby Boomers)
- 60-69 years of age (15.10%) (maturing Baby Boomers)
- 70-79 years of age (6.54%)
- 80-89 years of age (2.42%)
- 90+ years of age (0.32%)

Additional audiences are care givers needing support and referrals and citizens in town needing food and/or fuel assistance, other financial support, and social worker services. A potential future audience for transportation services is mobility-challenged adults.

Who: Department, Board, Volunteers, Partners

Functioning as a social services agency, the COA Department plans and implements programs and services to address the needs of the senior population and mobility-challenged adults and coordinates with the Massachusetts Executive Office of Elder Affairs. As of May, 2014, the department is comprised of four office employees on site at Town Hall: a full-time director, a full-time outreach coordinator/program manager, a part-time transportation coordinator and a part-time administrative assistant. The Town of Carlisle contracts with a licensed social worker for up to eight hours a week. Several part-time van drivers are employees in the field. The COA office is located at Town Hall, enabling collaboration with other town entities. Office hours are posted as well as communicated through the town's website and a monthly newsletter.

The COA Board has nine voting members, appointed by the Board of Selectmen, and several non-voting members (associates). The board meets monthly to provide policy direction, advice, and support for the work of the COA Department. Various subcommittees advance the work of the board and benefit the COA Department.

More than 100 people per year lend their time to help out with COA services, programs, and events. Many also help other departments, both as volunteers and as part of the Senior Tax Worker program.

COA volunteers saved the town money by working close to 4,600 service hours in 2013. (Source: MSC database)

The COA partners with many town departments and elected officials, community groups and state and regional entities to further the mission of the COA.

- Town of Carlisle - Board of Selectmen, Finance Committee, Town Manager, Treasurer, Clerk and Accountant, Housing Authority, Board of Health, Planning Board, Recreation Commission, Building Inspector, Board of Assessors, Carlisle Fire Department, Carlisle Police Department, Gleason Public Library, Carlisle Public School District, Concord-Carlisle High School.
- Community Groups – Friends of the Carlisle Council On Aging, Friends Of the Gleason Public Library, Carlisle Garden Club, Carlisle Churches, Concord Carlisle Community Chest, Girl Scouts, Boy Scouts, National Charity League.
- State Groups - Massachusetts Executive Office of Elder Affairs, Massachusetts Council On Aging.
- Regional Groups - Community Health Network Area, Lowell Regional Transit Authority, Minuteman Senior Services, Regional Transportation Coordinating Council.

What: Services and Programs

The COA offers a broad array of services and programs. Key services include transportation, outreach, fuel and food assistance, and loans of durable medical equipment. In 2013, the Outreach Coordinator made more than 4100 client contacts, an average of 344 a month. In 2013, the COA provided 1779 rides to more than 134 unique (unduplicated) people (or 10% of the target audience). Volunteer drivers provided about 10% of these rides. Typical rides consisted of travel to medical appointments, shopping, events, and COA sponsored day trips. Programs include social events, health clinics and lectures, exercise classes, nutrition events, and cultural activities. In 2013, programs and services reached about 520 unique (unduplicated) seniors or just over 39% of the target audience. (Source: MSC database)

Where: Program and Office Venues

The COA department schedules programs and services across multiple venues. Within Carlisle, venues include: Town Hall, Carlisle Churches, Gleason Public Library, Carlisle Public School District, Ferns Country Store, Carlisle Village Court Sleeper Room. Future use of the Benfield Farms Community Room is anticipated. Beyond Carlisle, the COA utilizes the Concord-Carlisle High School.

The COA department office space is located at the Town Hall and offers regular week day office hours.

How: Funding, Technology, Communication

The COA is supported through an appropriated town budget and a combination of grants, including one from the Friends of the Carlisle Council On Aging, a 501c (3) non-profit organization differentiated from the COA Board. The Concord-Carlisle Community Chest provides grant support as does the Massachusetts Executive Office of Elder Affairs through its State Formula Grant program. The Carlisle COA receives funding through the town's affiliation with the Lowell Regional Transit Authority. (*Exhibit VII*)

The COA populates the MSC database to track monthly and annual program utilization and analyze participation statistics to evaluate the reach and relevancy of programs and services.

The COA uses various media to reach its audience(s). Communication vehicles include outreach and response via telephone; a monthly newsletter, *The Carlisle Connection*; monthly email reminders and special alerts, as needed; publicity and announcements in the town newspaper, *Carlisle Mosquito*; a monthly local cable access television program; and social media, currently via Facebook.

Section 3: Keys to Success

The following enduring goals focus the COA's strategic vision.

I. Trust: Ensuring prudent management of the COA

II. Independence: Supporting mobility and access for Carlisle seniors and mobility-challenged adults

III. Connection: Providing opportunities for positive interaction for Carlisle seniors

IV. Functionality: Supporting emotional, cognitive, and physical well-being of Carlisle seniors

V. Security: Aiding safety and stability for Carlisle seniors

Section 4: Action Plan

Purposeful actions with defined owners and time frames support the objectives to ensure progress toward realization of each Key to Success.

I. Trust: Ensuring prudent management of the COA

Objective A: The COA Director and other Carlisle town personnel will manage COA resources responsibly.

Management/compliance actions:

Action 1. Comply with applicable federal and state laws and regulations as well as Carlisle town by-laws and keep up-to-date with changes through attendance at Department Head meetings as well as periodic workshops, trainings, and meetings sponsored by the Massachusetts Executive Office of Elder Affairs, the Massachusetts Council On Aging, and other relevant organizations. *(Director/ongoing)*

Action 2. Prepare reports for the Council On Aging Board. *(Director/monthly and annual town reports)*

Action 3. Track COA sponsored programs and services by utilizing MSC software, the COA database, as well as other office technology tools. *(Director and Staff/ongoing)*

Action 4. Prepare and submit annual report to the Massachusetts Executive Office of Elder Affairs. *(Director and Program Manager/July)*

Action 5. Manage day-to-day COA responsibilities by communicating with the COA staff, the Town Administrator, and other Carlisle town departments through staff meetings, one-to-one conversations, phone calls, and emails. *(Director and Staff/ongoing)*

Action 6. Direct COA staff, encourage training and development, provide feedback and conduct annual performance reviews. *(Director/ongoing and annually)*

Action 7. Monitor and assess volunteer needs. *(Director and Program Manager/ongoing)*

Action 8. Monitor staffing needs and advocate for increased hours as demands grows.

(Director/ongoing)

Action 9. Protect confidential client information. *(Director, Staff, Volunteers/ongoing)*

Communications actions:

Action 1. Prepare article highlighting COA programs and services for Carlisle's *Annual Report*; include feedback from the COA Board. *(Director/December and January)*

Financial actions:

Action 1. Prepare annual budget for review by the COA Board, the Carlisle Finance Committee, Town Administrator and the Board of Selectmen. *(Director/annual town budget cycle)*

Action 2. Prepare and submit incoming receipts and outgoing expenditures to the Town Accountant. *(Director/ongoing)*

Action 3. Research, plan, and apply for annual or ad hoc grants including but not limited to the Friends of the COA grant, the State Formula grant, and the Concord Carlisle Community Chest grant.

(Director/annual grants cycle schedules and as needed)

Objective B: The COA Director will manage facility needs for staff, storage, and programs.

Action 1. Forecast facility needs to the COA Board, the Town Administrator, the Board of Selectmen, and other appropriate boards and committees. *(Director/as needed)*

Action 2. Advocate for and support a planning process for COA dedicated and/or shared program space and expanded office and storage space. *(Director and COA Board/ ongoing with FY16 focus)*

Objective C: The COA Director and other Carlisle town personnel will manage COA resources responsibly.

Action 1. Provide advice to and oversight of the COA budget process. *(COA Board and Board Treasurer/ongoing and annual town budget cycle)*

Action 2. Review monthly staff reports and expenditures. *(COA Board and Board Treasurer/monthly)*

Action 3. Act as liaison to the Carlisle community by participating on town committees to assist staff and advocate for Carlisle seniors. *(COA Board/ongoing)*

II. Independence: Supporting mobility and access for Carlisle seniors and mobility-challenged adults

Objective A: The COA will assess and strive to meet expanding transportation needs for scheduled and on-demand service.

Action 1. Assess the demand for service outside of regular service hours/days. *(Director, Transportation Coordinator/ongoing)*

Action 2. Assess the demand for additional ADA compliant vehicles. *(Director, Staff, Transportation Subcommittee/ongoing)*

Action 3. Assess the number of ride requests that cannot be serviced within the scope of normal operating hours, policy and distance; propose solutions. *(Director, Transportation Coordinator/monthly)*

Action 4. Increase the number of transportation options through a FY15 pilot program for seniors and mobility-challenged adults. *(Director, Lowell Regional Transit Authority, Carlisle Town Transportation Task Force/ FY15 and as needed)*

Action 5. Improve utilization of resources and optimize van scheduling. *(Director, Transportation Coordinator, Program Manager, Day Trip Coordinator, Cross Town Connect/ongoing)*

Objective B: The COA will evaluate the feasibility of expansion of the transportation service beyond current time and distance parameters.

Action 1. Assess transportation requests and/or demand and frequency of such requests. *(Director, Staff, Transportation Subcommittee/ongoing until hours, days, radius are expanded sufficiently)*

Action 2. Assess transportation requests to determine wants vs. needs to strengthen policy. *(Director, Staff, Transportation Subcommittee, Carlisle Town Transportation Task Force/ongoing)*

Action 3. Assess the degree of success of the area roll-out of the Cross Town Connect consortium and evaluate the potential benefits, financial impact, and tradeoffs for Carlisle to join. *(Director, Transportation Subcommittee/FY15, FY16)*

Objective C: The COA will provide referral resources for support services for seniors and other residents in need.

Action 1. Update and promote Carlisle COA Elder Resource Guide. *(Staff/ongoing)*

Action 2. Communicate referral information regarding food and fuel assistance to the community. *(Staff/ongoing)*

III. Connection: Providing opportunities for positive interaction for Carlisle seniors

Objective A: The COA will promote connections among seniors, mobility-challenged adults, and other residents to lessen isolation.

Action 1. Promote, schedule, and staff resources for congregate meals. Work with volunteers to develop Community Conversations and other programs, including multi-generational programs. *(Program Manager, Staff, Volunteers/ongoing)*

Action 2. Staff and manage Friendly Visitor/Friendly Caller Programs to alleviate isolation. *(Director, Outreach Coordinator/ongoing)*

Action 3. Work with the Gleason Public Library and other town resources to assess opportunities for instruction in e-communications and computer literacy. *(Program Manager, Staff, Gleason Public Library Staff, Programs Subcommittee/FY15)*

Objective B: The COA will maintain and expand the volunteer corps.

Action 1. Manage annual Volunteer Appreciation event. *(Program Manager, Staff/spring)*

Action 2. Recruit and reinforce current and new volunteers. *(Staff, COA Board/ongoing)*

Objective C: The COA will explore opportunities for shared and dedicated program space to foster a sense of community.

Action 1: Influence the direction of future property use at 338 Bedford Road. *(Director, COA Board Chair, Senior Housing/Center Subcommittee/ongoing)*

Action 2. Utilize shared program venues within Carlisle and beyond. *(Director, Staff/ongoing)*

Action 3. Participate in open space and recreational long range planning. *(COA Board Chair/as needed)*

Action 4. Define the parameters and create a gift account to receive private donations toward a capital fund for a community/senior center. *(Director, other interested parties/FY16)*

Objective D: The COA will identify and assess characteristics and program/service needs of its target audiences.

Action 1. Form a Marketing, Communications, and Branding Task Force to create a strategy and plan. *(Marketing, Communications, and Branding Task Force/FY15)*

Action 2. Create an audience matrix documenting characteristics and needs of each audience tier; suggest programs. *(Marketing, Communications, and Branding Task Force/FY15)*

Action 3. Support the creation/distribution/evaluation of a survey(s) to assess or evaluate needs. *(Director/FY15)*

Objective E: The COA will promote its mission, programs, and services and work to gain community visibility and increased involvement.

Action 1. Utilize communication vehicles such as newsletters, email, and CCTV to inform target audience of monthly programs and alert them to time-sensitive issues on Medicare, scams, etc. *(Program Manager, Staff/ongoing and as needed for alerts) (Director; Chair, Marketing, Communications, and Branding Task Force/FY15)*

Objective F: Dependent upon venue limitation, staff, and volunteers, the COA will monitor and report program and service utilization.

Action 1. Track current unique (unduplicated) participants utilizing MSC data base and strive to involve more age 60+ residents as participants/clients and users. *(Director, Staff/annual fiscal year-end statistics)*

Action 2. Utilize communication vehicles, publicity, and branding strategies to identify under-served segments and maximize participation rate. *(Director; Marketing, Communications, and Branding Task Force; Staff/ongoing)*

Objective G: The COA will participate in and promote intergenerational activities.

Action 1. Assist in the application to participate in Generations United Best Inter-Generational Community Award Program. *(Director, appointed COA Board Members/FY15)*

IV. Functionality: Supporting emotional, cognitive, and physical well-being of Carlisle seniors

Objective A: The COA will assess and provide opportunities for social and learning engagement to serve its target audience(s).

Action 1. Independently or collaboratively manage and support programs such as cultural programs/life-long learning, aging-in-place, exercise programs, social programs, and multigenerational programs. *(Director, Program Manager, Volunteers, Program Subcommittee/annual planning)*

Action 2. Assess web based service that provides the capability for self-serve program payment and registration. *(Director, Town Treasurer/FY15)*

Objective B: The COA will assess and strive to refer appropriate support to serve Carlisle seniors who experience loneliness, loss, abuse, and/or limited mobility.

Action 1. Provide and coordinate services such as Social Worker, Friendly Visitors, and Friendly Callers. *(Director, Outreach Coordinator, Volunteers/as needed)*

Action 2. Promote, maintain, and utilize the Carlisle COA Elder Resource Guide to facilitate referrals. *(Director, Outreach Coordinator/as needed)*

Action 3. Address client status updates provided by Friendly Visitors, Friendly Drivers and others. *(Director, Outreach Coordinator, Transportation Coordinator, Social Worker/as needed)*

Objective C: The COA will offer programs to support the physical well-being of Carlisle seniors.

Action 1. Independently or collaboratively sponsor programs such as exercise activities, abuse awareness and prevention, health clinics, and topical medical awareness sessions. *(Program Manager, Volunteers, Board of Health/annually)*

V. Security: Aiding safety and stability for Carlisle seniors

Objective A: The COA will encourage seniors to improve safety in their homes and community.

Action 1. Encourage frail seniors living alone to enroll in the RUOK program (an opt-in/signup program). *(Carlisle Police, Outreach Coordinator/daily automated calls)*

Action 2. Manage Friendly Visitor and Friendly Caller programs to support the sense of safety and security. *(Outreach Coordinator, Volunteers/as needed)*

Action 3. Contact target audiences in case of any emergency. *(Staff, Local Emergency Preparedness Team, Volunteers/as needed)*

Objective B: The COA will work to improve the quality and quantity of food programs.

Action 1. Investigate the feasibility of adding resources for an additional monthly congregate meal. *(Director/FY16)*

Action 2. Investigate the feasibility of servicing isolated and mobility-challenged senior residents on congregate meal days. *(Director/FY16)*

Action 3. Improve meal quality for Meals On Wheels recipients by researching other sources. *(Director/FY16)*

Objective C: The COA will promote, advocate, and administer federal/state/grant programs in support of target audience financial stability.

Action 1. Research additional funding sources. *(Director/ongoing)*

Action 2. Administer fuel assistance to any qualified town resident in need. *(Outreach Coordinator, Volunteers/seasonally)*

Action 3. Promote health insurance/benefits counseling (SHINE, see Glossary) to Carlisle seniors. *(Outreach Coordinator, SHINE Counselor/monthly)*

Action 4. Coordinate access to and/or delivery of donated fresh produce from Gaining Ground and Carlisle Farmers Market. Explore additional options. *(Outreach Coordinator, Volunteers/seasonally)*

Action 5. Administer Carlisle Senior Tax Worker Program and advocate for expansion as needed. *(Director, Outreach Coordinator/annually)*

Action 6. Assess opportunities to expand senior tax relief (i.e., Sudbury Tax Relief Model); promote available options such as current in-town age-related/qualified tax exemptions. *(Director, COA Board, Senior Tax Advisory Committee/FY17)*

Objective D: The COA will explore and advocate for appropriate housing alternatives in town.

Action 1. Attend meetings to investigate and support housing alternatives. *(Director, COA Board Chair, Housing Subcommittee/as needed)*

Action 2. Partner with Carlisle Housing Authority to advocate for and plan future projects as appropriate. *(Director, Housing Authority/as needed)*

Action 3. Inform and encourage seniors to consider available diverse housing stock. *(Director, Outreach Coordinator, Housing Authority/ongoing)*

Glossary

Access: ability to find information; the capability to freely move about one's living unit and local environment.

ADA: Americans with Disabilities Act as defined by federal law.

Adjusted population: the gross population, removing census respondents who did not provide their ages

Aging in place: a concept that expresses a maturing person's goal of staying in his/her home and living independently as long as possible. This may involve in-home aids and adaptations.

Attached residences: apartments and condominiums, typically with a smaller footprint, potentially with first floor master suite and fee-based maintenance through an association. Enables aging in place; typical of livable communities.

Baby Boomer: demographic segment of over 70 million people born between 1946 and 1964.

Branding: creation of name recognition and positive image; the identity and benefit promise of a product or organization.

Caregivers: adult family members, friends, neighbors, paid aides, or other interested parties who monitor and/or care for those in need.

Carlisle Town Transportation Task Force: an ad-hoc group entrusted with the development of policy and procedures for the FY15 mobility-challenged adult pilot transportation program.

Community Health Network Area: Carlisle is a member of CHNA 15, which is one of 27 Community Health Network Areas (CHNAs) in Massachusetts created by the Massachusetts Department of Public Health in 1992. The CHNAs, an initiative to improve health through local collaborations, are part of a statewide effort to develop, implement, and integrate community projects that effectively utilize community resources to create healthier communities.

COA: Council On Aging, a town department.

COA Board: a nine member volunteer board that supports the work of the COA Department and is committed to compassion, outreach, and advocacy for age 60+ residents.

Cognitive: related to thinking, reasoning, and learning.

Cohort: a population sector of people sharing common characteristics.

Communication vehicles: various media such as print, TV, and online that carry an organization's messages and relevant, timely information to its target audiences; inbound/outbound telephone conversations.

Congregate meals: monthly breakfasts and luncheons for the age 60+ community.

Connection: positive interaction and communication with others in person, online, and through other media; the receipt of timely information regarding COA programs and services as well as special alerts.

Cross Town Connect: a regional consortium that provides shared van and driver scheduling and transportation services; may widen the COA's current geographical transportation radius and expand service hours for member towns. Offers member towns the potential for economies-of-scale and increased service levels. Carlisle will assess potential membership.

Day trip: half- or full-day scheduled, fee-based events that provide transportation out of Carlisle for visits to local museums, theaters, historical sites, cultural events, shopping venues, etc.

Dedicated space: physical space devoted solely to a specific purpose; ideally this includes utilization, policy definition and scheduling control for the management of a physical location for programming and/or offices.

Emerging Baby Boomer: residents age 50-59, future recipients of services and programs, future source of volunteers.

Focus Area: an initiative to which attention and consistent effort is applied that results in significant progress. A focus area is not necessarily completed in one fiscal year.

Friends of the Carlisle Council On Aging: a volunteer community group whose mission is to raise funds to augment the programs and services of the Carlisle COA Department, differentiated from the COA Board.

Friends of the Carlisle Public Library: a volunteer community group whose mission is to raise funds to augment and manage programs and services of the local library.

Friendly Caller: volunteer who contacts adults to verify their well-being as needed.

Friendly Driver: a volunteer, utilizing his or her own vehicle to provide transportation services or deliver Meals on Wheels.

Friendly Visitor: a volunteer who visits, regularly or as available, seniors in need to alleviate isolation and check on their status.

Gross Population: all citizens counted in the annual town census.

Inter-Generational: see Multi-Generational.

Local Emergency Plan Committee: serves Carlisle during natural disasters, utility emergencies and the like. The COA actively participates.

Livable Community: a community that welcomes and supports the needs of age 60+ residents by offering connection; emotional, cognitive, and physical well-being programs and services; mobility and access; and a sense of security and stability.

Long Range Plan: a strategic vision covering five years that sets priorities and contains an action plan; a living document.

Lowell Regional Transit Authority (LRTA): provides driver training for their vans, van maintenance, and access to purchasing discounted vans. Carlisle, as a member town, receives funding from the LRTA.

Marketing, Communications, and Branding Task Force: a group comprised of representatives from the COA Department and Board as well as several town residents; formed to address rebranding the COA Department and Board, refining definitions of the target audience and developing strategies to attract underserved audiences.

Massachusetts Executive Office of Elder Affairs: a state agency which supports adults age 60+ and assists local COAs.

Meals on Wheels: fresh and frozen meals provided by Minuteman Senior Services and delivered by Friendly Drivers.

Minuteman Senior Services: a regional state-funded social service agency that shares information, offers programs, and provides support to age 60+ residents in local communities. A COA Board member acts as liaison to this organization.

Mobility: ability to move safely and easily around one's environment.

Mobility-challenged adults: residents age 22+ who experience movement restrictions outside the home and require transportation services; excludes public school adults served by mandatory transportation services.

Multi-Generational programs: activities that link and engage age 60+ adults with younger age groups, such as high school or grade school students.

MSC: *My Senior Center* software program, used by the Carlisle COA, tracks service and program utilization to help set benchmarks and measure progress.

Outreach: proactive efforts to engage and involve age 60+ adults by providing referrals to services and programs; responsive in a timely and confidential way to individual-initiated requests for services and help.

Regional Transportation Coordinating Council: a new local area group dedicated to addressing transportation gaps in local towns.

RUOK: Are You Okay?, a safety and peace of mind program that residents can opt into that results in an automated regularly scheduled phone call; offered by the Police Department. Officers follow up on unanswered calls.

Security and stability: personal safety and sense of well-being; financial means adequate to meet basic expenses; access to adequate healthcare.

Seniors: age 60+ adults, as defined by the Massachusetts Executive Office of Elder Affairs.

Senior Tax Worker Program: a program in which income-based eligible age 60+ residents work assigned hours for town departments and receive payment to help reduce property taxes.

SHINE (Serving the Health Insurance Needs of Everyone) counselor: a trained volunteer, certified by the Massachusetts Executive Office of Elder Affairs in many areas of health insurance, including Medicare Parts A, B, and D; Medigap insurance; Medicare HMOs; prescription drug programs; Medicaid; Medicare assistance programs; and other programs for people with limited resources.

State Formula Grant: administered by the Massachusetts Executive Office of Elder Affairs, funds are based on recent census data and calculated annually at a state approved rate per senior.

Sudbury Tax Relief Model: based on resident's age and/or residency longevity, real estate taxes are reduced.

SWOT: a matrix exercise that helps an organization to assess current internal strengths and weaknesses as well as external opportunities and threats; guides long range planning.

Well-being: emotional, cognitive, and physical health.

Appendices

Exhibit I: Inclusive Process Generates Comprehensive Plan

Exhibit II: SWOT Assessment Guides Long Range Plan Process

Exhibit III: Taxes and Housing Options Affect Decision to Age in Place

Exhibit IV a: Town Survey Shows Need for Varied Housing Options

Exhibit IV b: Limited Housing Options Challenge Aging in Place

Exhibit V: Residents See Need for Varied Transportation Services

Exhibit VI a: Trend – Age 60+ Cohort Grows Despite Total Population Decline

Exhibit VI b: Trend – The COA Must Attract Maturing Baby Boomers

Exhibit VII: Funding Sources Augment COA Reach and Impact

Exhibit I: Inclusive Process Generates Comprehensive Plan

- | | |
|---------|---|
| Step 1: | Subcommittee formation |
| Step 2: | SWOT assessment |
| Step 3: | Creation of keys to success, objectives and actions |
| Step 4: | Creation of exhibits: research of statistics, trends and relevance |
| Step 5: | COA Board adoption: Present to Town of Carlisle Board of Selectmen, Friends of the Carlisle Council On Aging and other interested parties |

Exhibit II: SWOT Assessment Guides Long Range Plan Process

Internal Factors

Strengths
1. Experienced full- and part-time staff
2. Wide breadth of programs: social, cultural, wellness (emotional) and fitness
3. Intergenerational programs
4. Able to serve current transportation requests at 99 – 100% level
5. Broad base of volunteers
6. Promotion of support resources to frail/isolated seniors
7. Strong relationships and communication with Town Hall departments
8. Supportive COA Board and Friends of the COA
9. Strong service utilization, double that of towns nationally
10. Multi-channel communication(s) to target audience
11. Provision for financial assistance (food, fuel and tax relief)
12. Utilization of multiple program venues
13. Responsible fiscal management of town funds
Weaknesses
1. Low awareness of COA mission, services, and programs
2. Limited hours and days for transportation services
3. Lack of dedicated space impacts consistent/efficient program scheduling and hinders drop-in programs
4. Programs with low attendance/no enforcement of minimal attendance policy
5. Lack of strategic marketing and communication plan
6. Inability to provide transportation services to mobility-challenged adults
7. Tax relief advocacy (not varied or enough)

Exhibit II: SWOT Assessment Guides Long Range Plan Process (cont'd.)

External Factors

Opportunities
1. Friends of the COA funding for fiscal needs
2. Analysis of data to improve services/programs and gauge effectiveness
3. Influence the use of existing and potential community space at Bedford Road, Benfield Farms, Carlisle Public Schools, etc.
4. Expanded Lowell Regional Transit Authority budget
5. BOS request to expand transportation services via FY15 pilot program
6. Assessment of the needs of younger seniors (age 60-69) and emerging audience (age 50-59); widen COA reach
7. Cross-Town Connect may offer the ability to gain efficiencies for the scheduling/scale of transportation services
Threats
1. Increase in senior population, as a percentage of the town, who may need more support
2. Reduction in funding (local, regional, state, private, grants)
3. Some venues could be at risk for program scheduling
4. Inadequate office space for staff and storage
5. Growth and diversity of senior population may need more/different support
6. Attrition of talent and good will of volunteers
7. Rising property taxes
8. Change in town government support

Exhibit III: Taxes and Housing Options Affect Decision to Age in Place

Factor	Would Influence My Decision (% of Respondents)
Taxes and cost of living	81
Cost and bother of maintaining residence	71
Availability of other housing options	52

Source: 2009 Town Survey Question #13

Exhibit IV a: Town Survey Shows Need for Varied Housing Options

Housing Option	Maybe/Definitely Need (combined) (% of Respondents)
Small, private residences	53.3
Condo/apartments	52.7
Affordable housing units	33.8
Multi-family housing	20
Group or congregate housing	23
Housing with on-site assistance	44.5

Source: 2009 Town Survey Question #40

Exhibit IV b: Limited Housing Options Challenge Aging in Place

Housing Options	# of Units	# Income Qualified Units	Age Restriction?
Village Court*	18	18	Yes (18)
Malcolm Meadows*	12	0	Yes (12)
Rocky Point*	8	2	No (0)
Benfield Farms*	26	26	Yes (26)
Permitted Accessory Apartments**	15	0	No (0)
Totals	79	46	56 units age restricted

* Source: Town of Carlisle Housing Production Plan, 2010

** Source: Town of Carlisle Planning Board Office, May, 2014

Exhibit V: Residents See Need for Varied Transportation Services

Type of Service	Some Need/Great Need (Combined) (% of Respondents)
Curb service (no assistance)	59.9
On demand	44.7
Fixed route	42.7
Special events	34.4

Source: 2009 Town Survey Question #42

Exhibit VI a: Trend - Age 60+ Cohort Grows Despite Total Population Decline

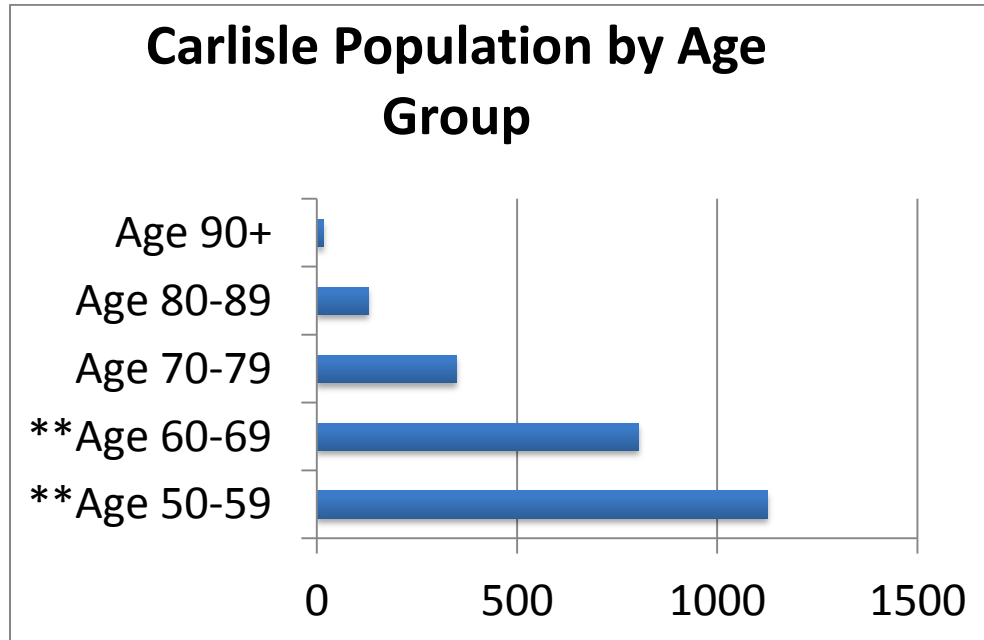
	2011	2014	Delta	% change
Total population	5601	5380	(221)	(3.9)
Age 60+	1207	1357	+150	+12.4

In 2011, 21.54% of the population were 60+.

In 2014, 25.22% are 60+, indicating an 12.4 % increase of residents eligible for COA services in just 3 years!

Source: Town Clerk, February, 2014

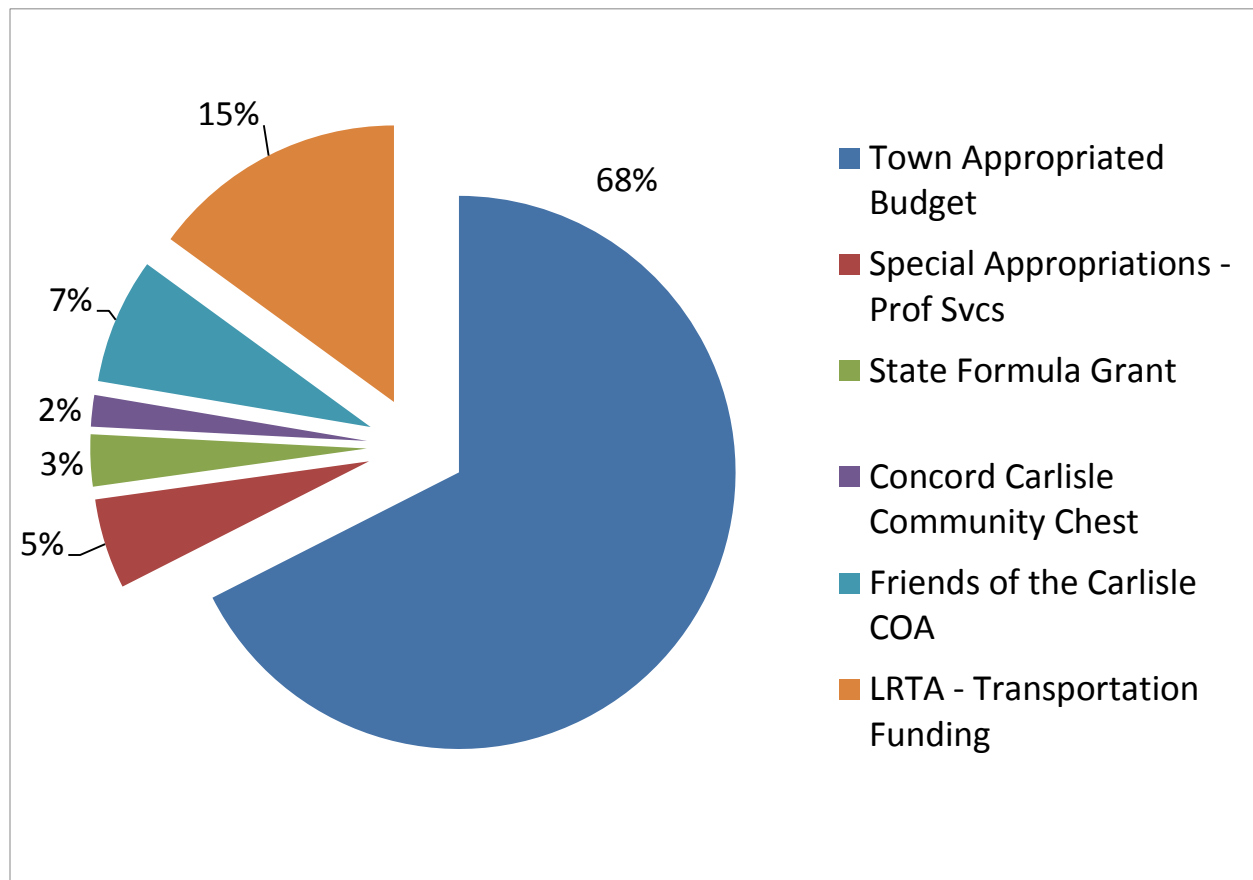
Exhibit VI b: Trend – The COA Must Attract Maturing Baby Boomers



** The scheduling and diversity of COA offerings must attract this burgeoning population segment.

Source: Town Clerk, February, 2014

Exhibit VII: Funding Sources Augment COA Reach and Impact



Source: FY14 COA Budget